VF(C.B.)
Ontario Public Service

EXISTING EVALUATION TECHNIQUES

PRELIMINARY ASSESSMENT OF TYPES OF JOB EVALUATION METHODS

INTRODUCTION

Job evaluation systems or plans use several basic methods of job evaluation, either in a pure or mixed form.

The basic methods are:

Ranking

- jobs are ranked on a whole-job basis to others within a organization or organizational unit, and are compared on the basis of importance or difficulty;

- this method is simple, straight-forward but requires the evaluators to be familiar with the jobs, making it impractical for large numbers of different jobs.

Grade Description (or "Classification Method")

- jobs are compared on a whole-job basis to a ranked set of definitions containing varying levels or degrees of difficulty, usually within occupationally-based groupings;

- it is relatively easy to develop and apply an evaluation plan based on this method because of the comparatively few levels;

- comparisons are limited to within the group covered.

Factor Comparison

. component "factors" are determined for groups of jobs, factors such as "skill", "judgement", "responsibility", which are exemplified by "key jobs" or "benchmark jobs";

. values are assigned to the factorial components of the key jobs, expressed usually in weighted quantities, percentages or in rank order;

. jobs are evaluated factor by factor against the key jobs and the results are calculated to arrive at a level or rank;

. this method allows jobs to be evaluated on a factorial component basis giving flexibility to the process; comparisons are within the group(s) covered by the key/benchmark jobs.

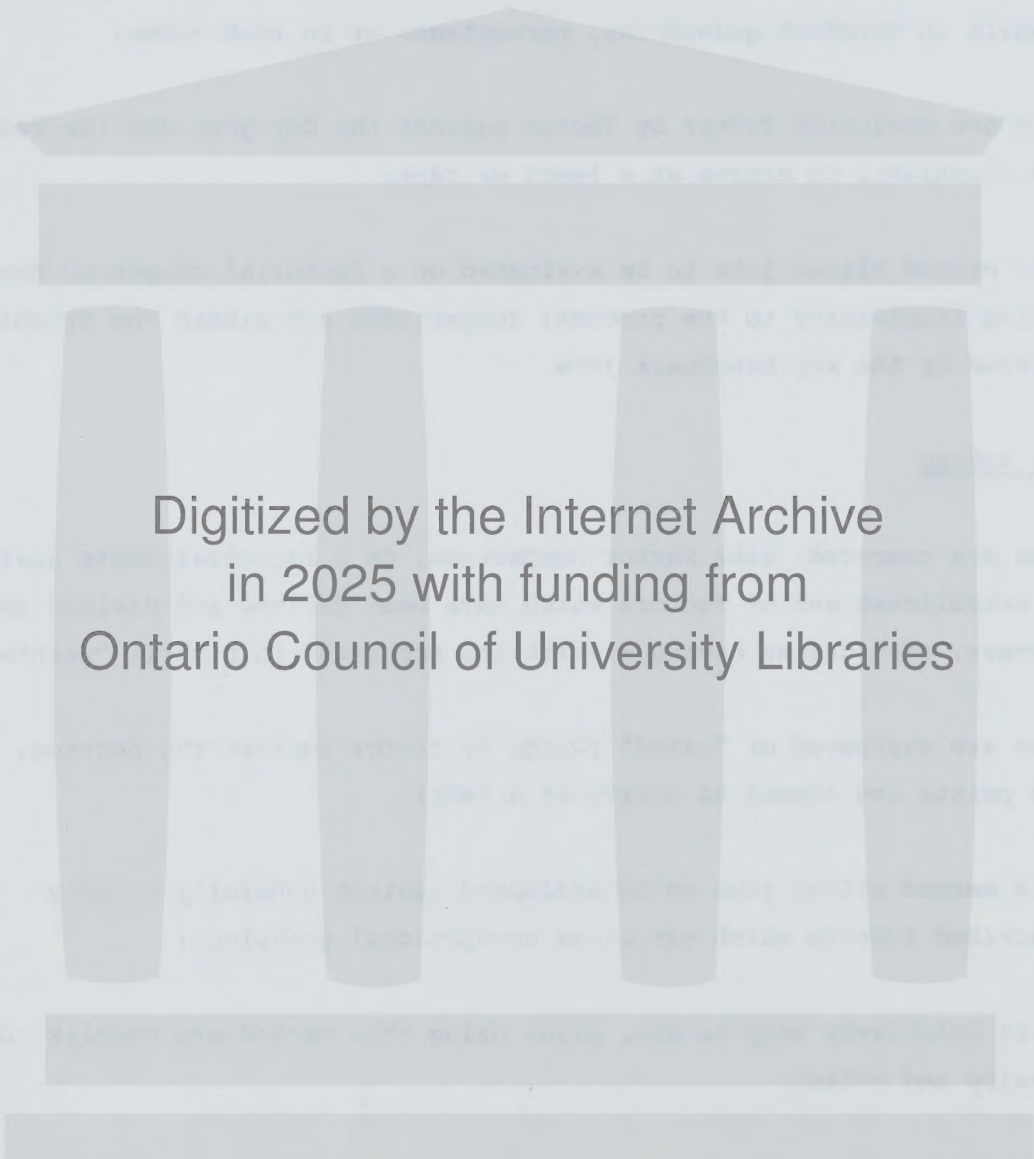
Point Rating

. jobs are compared, like Factor Comparison, on a factorial basis against an established set of factors which have been defined and divided into degrees, each degree having a weighting expressed in numeric "points";

. jobs are evaluated or "rated" factor by factor against the degrees, and the points are summed to arrive at a level;

. this method allows jobs to be evaluated against generally broadly described factors which can cross occupational groupings;

. while relatively easy to use, plans using this method are complex to develop and defend.



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JOB EVALUATION METHODS USED IN THE O.P.S.

Ranking

- used for two specialized groups, Research Scientists and Legal Officers;
- the work of the employee is individually appraised by experts in the field and a classification level is recommended;
- this method permits an assessment of very specialized work that is dependent on an individual's abilities/performance;
- evaluations must be done by those extremely knowledgeable in the field to be considered fair/acceptable.

Grade Description

- used to classify all jobs in the Bargaining Unit;
- system divides all Bargaining Units jobs into separate categories, groups, and job families (class series) and then establishes grades (levels) within these series for which descriptions (classes) are developed, such as Data Processing Technician 5, or Economist 2;
- this method is fairly straight-forward to use as the grade descriptions describe the normal characteristics of the work within the job family;
- as the system is not readily responsive to technological or other changes in work structure, "atypical" classifications can result.

Factor Comparison

- a derivative of the factor comparison method is used to classify all "Management" jobs, i.e. Management Compensation Plan;

- it is an occupationally grouped benchmark/factor system; the benchmarks were derived from real jobs;

- the factors employed in the plan are unweighted which allows for greater flexability and interpretation within occupation groups; in this regard the plan differs from traditional factor comparison methods;

- the compensable factors used in the plan are -- Knowledge, Judgement, Accountability and Contacts;

- this method employs the principle of "best fit" which means there are no atypical classifications in the Plan;

- it recognizes significant differences in the work;

- it requires considerable interpretation on the part of the evaluator when classifying a position which is different in nature from the benchmark since the benchmark is based on a real job.

Point Rating

- the O.P.S. does not currently have any point rating plans in operation;

- a modified point rating/factor comparison plan has been developed to cover almost all office support positions in the O.P.S. (Office Administration Group); it is currently being negotiated with O.P.S.E.U.;

- this plan provides common factorial criteria for the classification of a full range of positions found in job families within office support work, e.g. typists, mail clerks, secretaries, accounts clerks;

- as in other point plans, the structure of the plan is somewhat compex and the allocation of the weights to the factor levels may be difficult to defend.

METHODS USED OUTSIDE THE O.P.S.

The information about the use of job evaluation systems outside the O.P.S. is limited, but some general trends appear. Surveys done in Canada and the U.S. indicate that only 50 - 60% of employers use some kind of job evaluation plan. Usually a major employer would use two or more plans to cover different types of work, e.g. manufacturing, clerical, managerial, which allows the selection of different evaluation criteria that are applicable to the particular type of work.

The systems used outside the OPS can be grouped by the evaluation method on which they are based:

Ranking

. used mainly by small and medium sized companies; is the simplest and least expensive system when the number of distinct jobs is small.

Grade Description

. used extensively in the U.S. federal civil service;

. used mostly by small and medium sized companies and various governments in Canada;

. it is relatively easy to understand and use; it precludes comparisons between different occupational groups.

Factor Comparison

. least used method in the private sector both in Canada and in the U.S.;

. is generally perceived to be difficult to develop and use.

Point Rating

. most used method by the private sector both in Canada and the U.S.;

. it is especially favoured by large organizations because it is quantitative and structured and it allows the inclusion of a number of occupational groups within the same plan;

. it does not in itself ensure "unbiased" evaluations; to achieve that, factors would have to be chosen and weighted in an "unbiased" manner.

Other

Methods other than the ones mentioned are used to a limited extent. Rather than being unique systems, they are usually combinations of the basic methods.

DEVELOPING A SYSTEM

. Job evaluation systems can be developed within an organization or a copyrighted, established methodology can be purchased from consultants. Substantial savings in development time, plus the assurance that the plan has worked elsewhere are the merits of a purchased system. These systems have inherent values and emphases that may not be suitable for their new "host" organization without adaptation to a greater or lesser degree.

. A recent development is the "policy capturing" approach to determining the factorial weightings within an organization's plan(s). This is a computer assisted statistical analysis which "captures" and formulizes an organization's compensation values, but does not introduce any new values of its own. The "PAQ" plan is an example. Alternatively, an "a priori" approach to value setting can be used which assigns predetermined weights to the factors that are judged to be reasonable. This introduces new values, potentially.

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